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ABSTRACT

This monograph examines issues related to the inclusion of students with disabilities as part of an ongoing study of Success for All (SFA), a popular reform model for improving student reading performance. An executive summary identifies four lessons resulting from interviews with principals, teachers, and related staff in four SFA schools. These include: (1) the process by which schools select a reform model can be crucial to ensuring the inclusion of students with disabilities; (2) including all students in the reform necessitates changes in the basic organization of the school; (3) applying new curriculum and instruction in the classroom can be challenging for both general and special education teachers; and (4) when whole school reform is successful, it becomes integral to the vision, organization, and culture of the school. Individual sections of the report examine: reform implementation in SFA schools; the relationship between schools and model developers; making changes to the school structure; determining what goes on in the classroom; and creating an integrated reform. (DB)

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Implementing Reform

What Success for All Teaches Us about Including Students with Disabilities in Comprehensive School Restructuring

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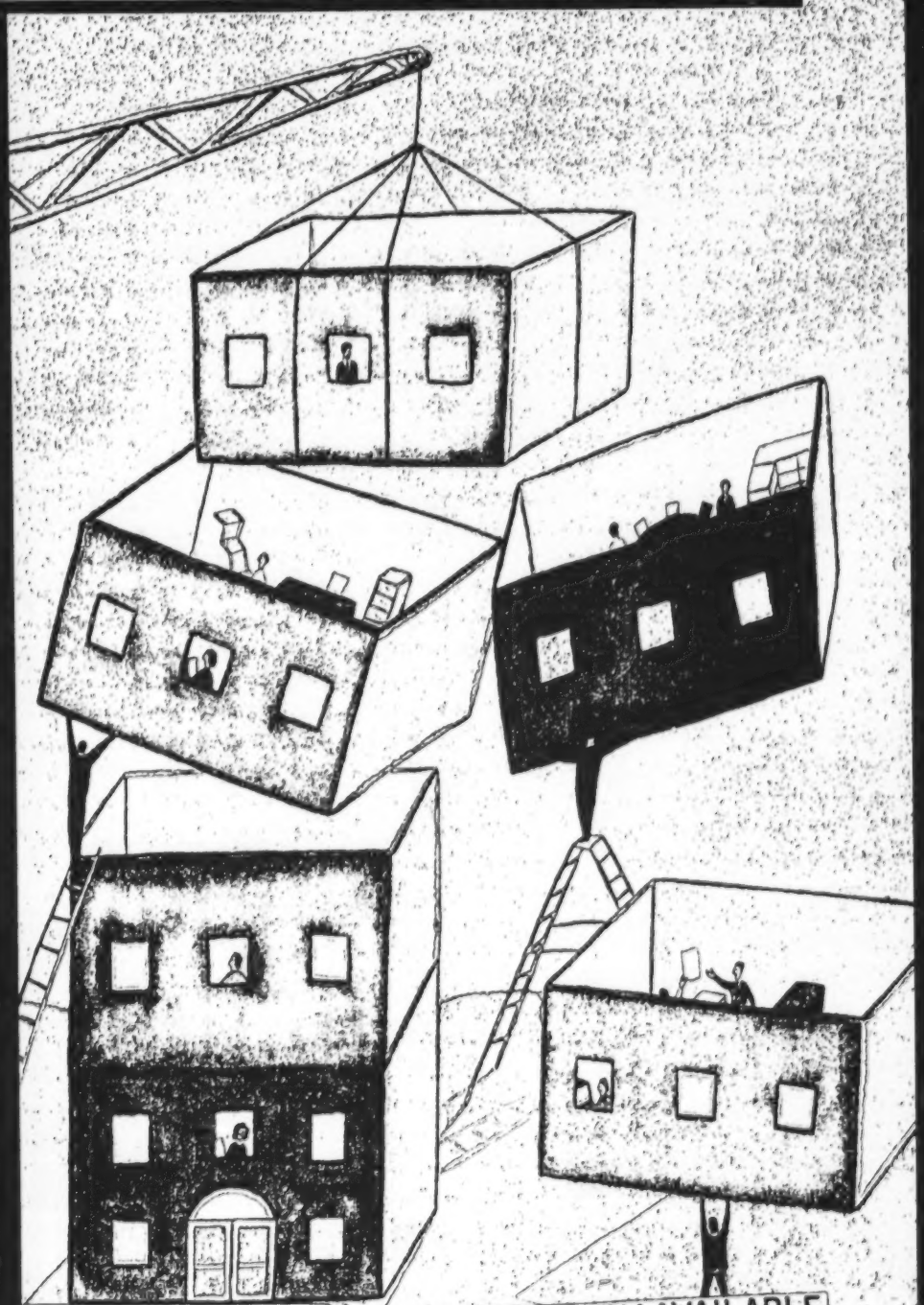

April 2001

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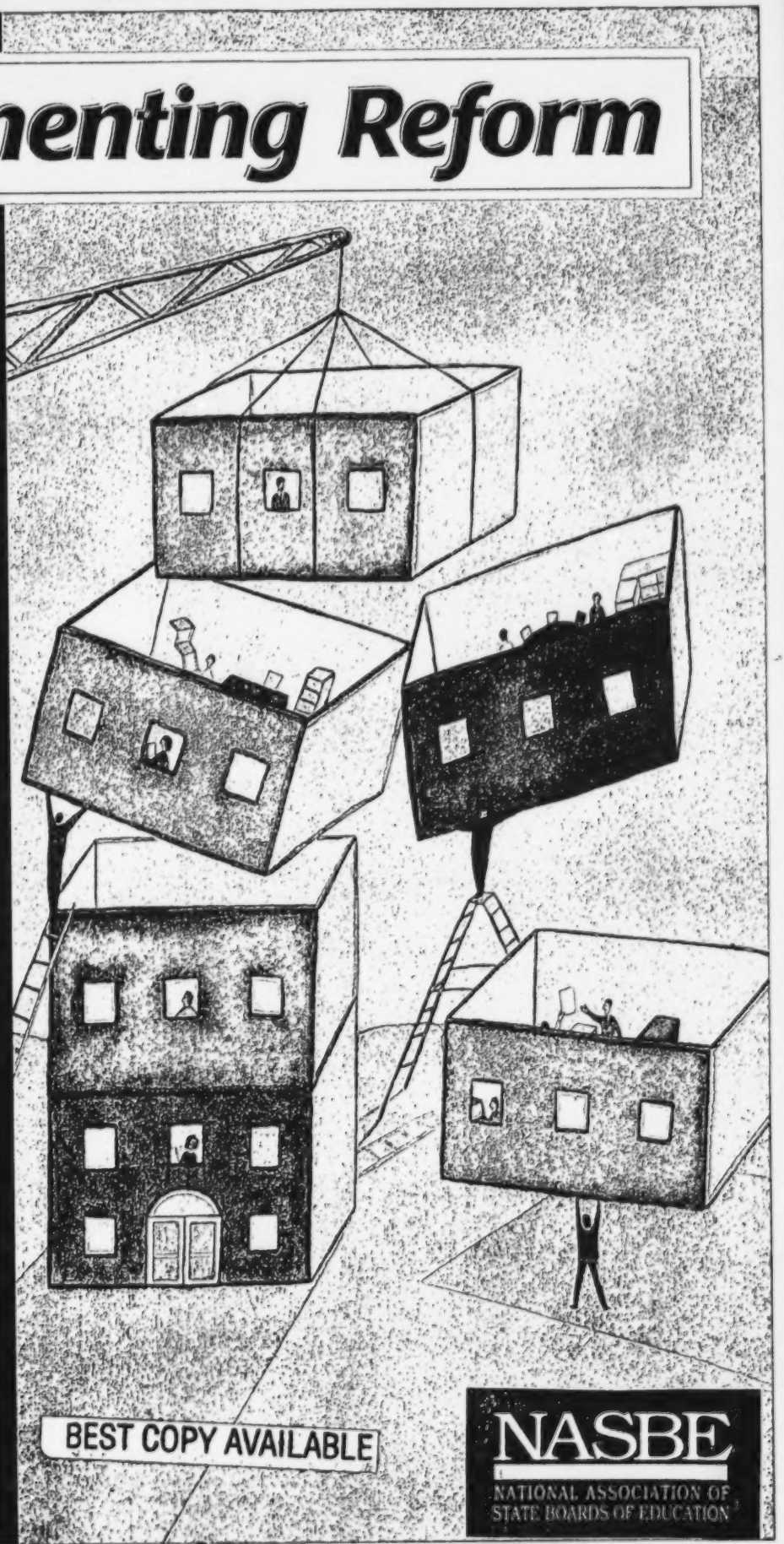

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Executive Summary

Comprehensive school reform offers an opportunity to cultivate higher-performing schools that serve all children. To understand what happens as schools embark upon this change process, the authors are studying four elementary schools implementing the Success for All program. This paper draws on interviews with the principals, teachers, and related staff in those schools and uses their experiences first to identify issues that schools face when adopting a comprehensive reform model and second to highlight how the restructuring process can affect students with disabilities. From these experiences, the authors outline the following lessons learned:

- The process by which schools select a reform model can be crucial to ensuring that students with disabilities are included in reform efforts. This is the time to explore how the new model will serve all students, address any concerns general and special education teachers might have about including students with disabilities, and build buy-in on the part of the staff and parents.

- Including all students in the reform necessitates changes in the basic organization of the school. Unless the underlying structures, such as teacher and student assignments, are aligned with the intent of the reform, change will be limited. The experience of these schools indicates that even the most rigorous whole school reform models have difficulty combating long-standing practices of tracking and isolation of students with disabilities.

- Applying new curriculum and instruction in the classroom can be challenging for both general and special education teachers as they sort through what they themselves believe works and what the model dictates. As they incorporate adjustments and enhancements to the new curriculum, all teachers need to be careful that the changes remain within the character of the reform model.

- When whole school reform is successful, it becomes integral to the vision, organization, and culture of that school, and it also acts as a way to integrate the growing array of legislative and administrative mandates into the school setting. This comprehensive approach avoids staff treating each new requirement—including the reform model itself—as an add-on to everything else that goes on in the school.

Chapter 1

Studying Reform Implementation: An Introduction

In recent years, districts and schools have increasingly been turning to comprehensive school restructuring models as vehicles to promote higher-performing schools. These reform models are attractive due to their whole school approach, as research shows that change is more likely to occur when all the elements of the school share a single focus and organizing vision. But when schools embark on comprehensive reform, do they really apply an all-encompassing approach? Is everyone included in whole school reform? How are separate programs and student populations combined into using the same model? What issues arise in fitting the model to the school? Do the resulting changes meet the needs of all students?

This monograph explores these issues through the lens of an ongoing study of Success for All (SFA), a popular reform model for improving student reading performance. The study focuses on factors that influence sustainability of Success for All and how students with disabilities have fared in the program. The research is being conducted through a comparative case study of four schools using Success for All. This report, developed midway through a four-year project, draws on the information collected at the four sites to identify those experiences and lessons learned that might inform policymakers' discussions, as well as help other schools adopting restructuring models and including students with disabilities in that whole school reform.

After providing some background information on the study and sites visited, the paper focuses on three sets of issues. The first deals with setting up a relationship with an outside technical assistance group, including how the school decides to adopt a whole school model, who is included in that decision, and what kind of training and support the reform model organization provides the school to help implement the program. The second looks at what kind of structural changes have to take place in the school organization to operate and sustain the reform and what that can mean for students with disabilities. The third set looks at what aspects of the model instructional approach fit students with disabilities and how teachers approached accommodations to SFA. The paper concludes with some observations on the tensions that continue to exist as schools struggle to integrate the reform model design and the school environment, as well as the impact these tensions have on students with disabilities.

Background on the Study

In the fall of 1998, the Office of Special Education Programs (OSEP) in the U.S. Department of Education awarded a group of research grants to study what influences the sustainability of promising practices for students with disabilities. The research initiative reflects the widespread frustration within the education community that even highly successful interventions frequently disappear soon after implementation. While most of the studies in this grouping focus on maintaining changes at the teacher and classroom levels, this study is the only one looking at sustainability in the context of a schoolwide model.

Examining the sustainability of comprehensive school reform is appropriate because most of the whole school models, including Success for All, are based on the tenet that all children can learn and because many models expressly encourage inclusion of students with disabilities. The study uses indicators of sustainability to document whether a school has changed in support of SFA. The indices are derived from the literature on change, organizational analysis, and the reform process, and they include evidence of positive impact on student outcomes and continued delivery of all the program elements to the targeted population. The project also examines three categories of factors that can constrain or facilitate sustaining the reform, including the characteristics of the reform model, the school and classroom capacity, and the role of the school district and other external forces.

The study explores both the issues of sustainability and effects of the program for students with disabilities by conducting case studies of four schools and cross-site analyses over four years. At the time this paper was written, fieldwork had been conducted in the spring of 1999 and 2000 and included all four schools the first year, but only three the second year. Visits to each school took place over a three- to four-day period. Each visit included role-specific interviews with the principal, SFA building facilitator, school counselor, special education and general education teachers, SFA reading tutors, and other staff serving on the Family Support Team (an element of the SFA program). Protocols were designed to elicit evidence of continued program implementation and to identify factors related to SFA, the school, and the district that either helped or hindered program sustainability. During the two years of fieldwork, researchers conducted 79 interviews. In addition, in the second year of the study, project members observed the SFA reading block, administering an observation instrument to document implementation of SFA curriculum and instruction. Relevant documentation was also collected.

Although the main focus of the study is the sustainability of SFA, the case studies also provide rich narratives as to how school staff approach whole school reform and what kind of issues arise when students with disabilities are included in that effort. While subsequent reports will address the issue of sustainability, this monograph focuses on the issues that arise during the implementation of a comprehensive reform and extrapolates the lessons learned from the experiences of these schools.

Success for All

SFA is an early, whole school reform model focused on language arts development at the elementary school level. Developed in 1987 by Robert Slavin, Nancy Madden, and a team from Johns Hopkins University, SFA grew out of research on effective instructional strategies for students at risk of school failure and work with inner-city schools serving high-poverty populations. It has become the most widely used of the comprehensive school reform designs. By the beginning of the 2000-2001 school year, approximately 1,800 schools were using the SFA model.

The SFA design is built around the premise that acquiring reading skills in the early grades is the key to subsequent success in school. Curriculum and instruction are highly specified and scripted and serve three levels of reading: reading readiness for the pre-kindergarten and kindergarten students; Roots, the beginning reading program generally aimed at kindergarten and first grade; and Wings, the program for the upper grades that applies cooperative learning and other instructional strategies to whatever basal reading series the school is already using. Because it is much

harder to successfully remediate lagging students, the SFA philosophy is to prevent any child from falling behind by using early intervention and prevention strategies.

The elements of SFA include:

- ***A 90-minute reading block.*** Students are assigned across class and across grade in small, homogeneous groupings according to reading level.
- ***Eight-week reading assessments.*** Students progress at their own rate due to frequent assessments and consequent reassignments to reading groups at the appropriate reading level.
- ***Tutors.*** The poorest-performing students in the primary grades receive daily, structured tutoring keyed to their reading group instruction and targeted to areas of individual weakness.
- ***A facilitator.*** The building-level facilitator, who is employed by the district and not the SFA Foundation, sees to the day-to-day running of the program, distributing materials for each reading unit, testing and assigning students to reading groups, and acting as the gatekeeper for referrals to the family support team. The facilitator also takes an instructional leadership role by observing classes and providing feedback, meeting with the teacher grade-level teams, responding to teachers' questions about the program, and contacting the SFA organization for guidance when needed.
- ***Family support team.*** This in-house team oversees a schoolwide attendance program and parent outreach activities. In addition, the team develops individual action plans for students referred for problems that hinder attendance or learning. Members include the principal; facilitator; counselor; psychologist and other relevant health, social service, or parent outreach staff; and the parent and teacher of the referred student.
- ***Teacher grade-level meetings.*** Teachers meet regularly with the facilitator around issues related to SFA.

In addition, the SFA Foundation provides training, materials, implementation checks, and ongoing professional development to participating schools.

SFA and Students with Disabilities

In contrast to other school restructuring models, SFA has made keeping students out of special education a specific goal of the program. The developers of the SFA model believe that the aggressive application of prevention and early intervention strategies can keep children from falling behind and significantly reduce the number of students placed in special education, a concept they have dubbed "neverstreaming." Thus, the model features early identification and response to problems through frequent monitoring of individual student progress, the provision of tutoring targeted at students having difficulty in beginning reading, and the intervention of the family support team that can bring the parents, teacher, and outside health and social services together to address specific problems.

Schools that adopt the SFA program are expected to include, as much as possible, those already identified as students with disabilities. This implies not only offering the SFA curriculum to students with disabilities, but combining general and special education students according to their reading level. It is expected that students with disabilities also have access to the additional supports provided through tutoring and the family support team.

Since its inception, the SFA organization has evaluated the program at multiple sites, using control groups and measures of specific reading skills. The results have consistently shown that for grade cohorts in SFA schools, there is a significantly greater impact on word comprehension and attack skills, as well as reading comprehension, when compared to similar schools not using SFA. Moreover, the results show the differences are particularly significant for those in the lowest quartile of their grade. In addition, the experience of the SFA pilot schools suggested that reductions in special education placements

and retention were linked to the implementation of SFA.[1] However, there has been little or no examination of the experiences of students with disabilities and their teachers as a result of implementing SFA or other comprehensive restructuring models.

Selection and Context of the Schools in the Study

A number of criteria guided school selection for the study, including a desire to limit outside environmental influences by choosing four schools in the same school district. With the assistance of the SFA organization, researchers identified a large, inner-city district with a pool of nine schools already using the SFA reform model. Selection was based on information gathered through interviews with the principals of all nine schools and consultation with the SFA organization and the school district. Criteria included confirmation that the school was using the program, that students with disabilities assigned to the school were also part of the program, and that the school had demonstrated some success since implementing SFA, as evidenced by improved results in district reading test scores.

There were many similarities among the four schools chosen for the study. As the table on the opposite page illustrates, all served a similar socioeconomic population. There were significant differences, however, in the percentage of students receiving special education services, although most of these students were classified as having learning disabilities.[2] Schools 1 and 4 had a combined total of five self-contained classrooms for students identified as emotionally disturbed, hearing impaired, and mentally retarded. Students in these self-contained classrooms did not participate in SFA.

The district designated all four as targeted-assistance schools in 1996. They had been identified as among the 20 lowest-performing schools in the district, as evidenced by each school's scores in reading and math on the Stanford Achievement Tests, 9th Edition (popularly known as the SAT-9). The district directed the targeted-assistance schools to choose from a selected list of whole-school reform models, provided them with extra resources, and set goals for improvement in the test scores.

That same year, the district adopted the Houghton Mifflin reading program. All the teachers in the schools were trained and monitored in this whole language approach to reading, and the district assigned a change facilitator to one of the four schools to help teachers make the necessary instructional changes. However, before the end of the first year, the district shifted emphasis and told all the targeted-assistance schools that they now had to choose one of several reform models approved by the district. Two of the schools already had some experience in restructuring, having participated four years previous in yet another district initiative to implement the Comer model, known as the School Development Program.

All four schools chose SFA as their reform model, and the district has maintained its strong support for the restructuring effort since implementation began in 1997. The district helped schools during the first year by covering half of the training costs and funding the SFA facilitator position in three of the schools. By the end of that first year, all four schools had posted substantial increases in their SAT-9 reading scores, with three schools surpassing the improvement goals set by the district. Since the first year these schools implemented SFA, however, the test results have been more erratic. Two of the schools actually posted significantly lower

[1]Robert E. Slavin et al., *Every Child, Every School: Success for All* (Thousand Oaks, CA: Corwin Press, 1996).

[2]Three of the schools had a backlog of special education referrals, part of a district-wide backlog of testing and administrative cases numbering over 2,200 in June 1997. The district was found out of compliance with federal laws and negotiated a three-year plan with the U.S. Department of Education to bring the special education division into compliance with federal law.

reading scores the second year. Still, the district continued to support SFA, encouraging lagging schools to check the faithfulness of their implementation of the model.

This study began during the second year these schools implemented SFA, after all four schools had posted their initial impressive gains. The remainder of this report identifies issues these schools faced as they implemented the program, especially in determining how to incorporate students with disabilities in the restructuring effort.

Characteristics of the Four Schools in the Study (1997-1998)

	School 1	School 2	School 3	School 4
Total school enrollment	582	401	433	510
Percentage of students enrolled in special education*	9.1	8.9	4.6	17.4
Percentage of African American students*	99	99	99	99
Percentage of students receiving free/reduced lunch*	96	93	92	93
Percentage of students reading below basic**	39	57	39	40

*All data were collected for the fall of 1998.
**From the results of the SAT-9, administered in the spring of 1997, just before the schools began implementing SFA.
"Reading below basic" is defined as little or no mastery of fundamental knowledge and basic skills.

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Chapter 2

Establishing a New Relationship: Schools and Model Developers

When schools choose a developer's model, they begin a relationship with an outside organization dedicated to assisting implementations that are true to that model. The relationship begins with the selection process. Schools want to have a good fit, meaning that ideally they want to choose a reform model that matches their specific needs and environment, and they also want an organization that provides adequate technical support. The developer wants some guarantees as to the buy-in of the staff and the commitment of adequate school time and resources needed for a successful implementation. Only then do the two parties work out a specific implementation plan, detailing their relationship and milestones for progress over the coming year. The developer's organization, in this case the Success for All Foundation, often becomes the major source for professional development during and beyond implementation of the design.

The four study schools' decision to use Success for All did not involve much consideration about how students with disabilities or special education teachers would participate in the reform. However, the decision, its implementation, and the provision of technical assistance from the SFA Foundation had an effect on both.

The Reform Model Selection Process

The SFA facilitator at one school provided an encapsulated version of the selection process at all four schools:

> The purpose of having Success for All as our model came from downtown originally. Our second year [as a targeted-assistance school], they [the district] decided that targeted schools should pick a change model. We were told there were three models we could select from, and we set up interviews by the companies to bring in the three models, and we had to vote on which model.

The impetus for choosing a reform model clearly came from the district. Only one principal noted prior interest in the SFA model, and this interest was not pursued because the implementation costs were deemed too expensive. Circumstances changed when the district not only required schools to make a choice, but also paid half of the training costs the first year.

Even though the district triggered the decision, many teachers realized that something had to be done to improve their schools' performance. A fourth-grade teacher noted that "we were kind of apprehensive about the program. But we knew that we had to do something to help students improve in their reading and ultimately improve their test scores. So we were willing to see if this would be the answer for it."

Another teacher also felt her school needed a more comprehensive approach because students across the grades lacked basic reading skills. "I think the reason we needed a program for the whole school was that children had gotten to intermediate levels and had not acquired the skill of decoding words. So that's what we're doing right now—playing catch-up."

A master teacher appointed to help one school a year before SFA was adopted identified the problem underlying students' poor performance as endemic to the school:

> No one was teaching directed reading. There was no vocabulary development. No phonics. There was no question why the scores were low. It is instruction. It is not the kids. It is not the fact that they're poor. It is the instruction. It is so basic.

Given these problems, SFA provided a model that fit many of these schools' needs. The assignment of students to reading groups according to their actual reading level provided even older students an opportunity to acquire basic reading strategies and "catch up." In addition, the provision of well-defined and scripted curriculum and instruction, combined with professional development support, offered one route toward addressing inadequacies in the teaching.

SFA offered one other advantage. These schools had embarked on a number of program changes in a short period of time, usually at the direction of the district. As one principal put it, "By the time you get your feet on the ground, you move to another challenge." Within the SFA curriculum and instruction were elements of approaches used in the past. One facilitator called SFA "eclectic" because "it looked at a vast array of programs that had worked and was research-based, and then they pulled and coordinated the best of each of the programs." The facilitator believed that as a result each teacher would find something familiar in the program, particularly because SFA applies its instructional approach to the school's existing basal readers once students have progressed through the basic reading portion of the program. For schools that had just spent a year learning a new reading program, this was a significant advantage. As on teacher put it:

> The whole district had gone Houghton Mifflin reading, and we had taken all these workshops and classes on implementing the Houghton Mifflin program and the pacing and all the components, and then all of a sudden here we are using another program. I said, "Well, thank God, we are still using the same books."

One of the principals also found this an advantage, explaining that "we tried to pick a model that was close to what we already had in place, instead of trying to reinvest anything. That reform effort appeared to meet our needs better than others, so that's how we chose Success for All."

Getting Buy-In

Garnering teacher support for restructuring the school is crucial to successful implementation. One way model developers try to gauge commitment is to require faculty votes as part of their application procedure. The SFA Foundation requires a secret ballot with at least 80 percent of the faculty voting to adopt the design. Ideally, schools use the process to acquaint teachers with the reform model and consider the consequences of a commitment to restructure the school. One principal described the process:

> It's just not classroom teachers involved in this. This is your special subject teachers; this is everybody in your school, your whole staff. So we had meetings involving the whole staff, and we voted 100 percent to implement this program, and when anybody would drag their feet, I said,

> "Remember, we're all in this together. We voted to do this together. We need to stick to what we are saying," and that kind of thing. So I think that plays a big part in a successful implementation: everybody has to be on the same page, so to speak.

Even though all four schools mustered a sufficient vote to apply to the SFA Foundation, the votes themselves may not have been true measures of support, given the pressure from the district. One school had to take two votes to reach 80 percent approval for SFA. Even then, the facilitator noted, they only succeeded because the staff feared that the school would be reconstituted if they did not approve a reform measure. Even in the school garnering 100 percent support, the facilitator admitted that some teachers continued to be resistant to working with the program.

Who Is Included in the Reform?

For the special education teachers in these schools, it was not always clear whether they would be included in the implementation of the reform model. One special education teacher voted for SFA because "we all knew we had to," but also because she didn't think it would affect most of her students or herself. When they were incorporated into the reform, she regretted not having done more research on SFA and alternative models.

Ultimately, all four schools included students with disabilities in SFA, although the degree of involvement varied. Prior to the introduction of SFA, none of the schools had integrated students with disabilities into an academic curriculum. Two schools assigned them to home rooms and special subject classes, like art and physical education, with general education students. The students spent the balance of the school day in resource centers taught by special education teachers. These two schools used the SFA reform to include students with disabilities in the general education reading program.

The other two schools took different approaches. Both had operated separate special education and general education programs. One school continued to keep the programs separate but adopted a modified version of SFA for students with disabilities served in resource centers. The final school changed its approach each year. The first year SFA was introduced, students with disabilities were completely excluded from the program. The second year, the school used a mainstreaming model similar to the first two schools. Students with disabilities were part of the SFA general education reading block in the morning but attended resource centers in the afternoon. The third year of the SFA implementation, this same school moved to a full-inclusion model for students not assigned to self-contained classrooms.

Including students with disabilities in SFA raised concerns for general education and special education teachers. For general education teachers, the issues centered around behavior management and instructional needs. According to one general education teacher, "Actually, people were kind of upset because you have a lot of special-ed kids that have behavior problems, and even though they may read on that level, you still have those behavior problems."

Some general education staff also argued that they lacked the training to apply the appropriate learning strategies for students with disabilities, an attitude that sometimes reflected how general education teachers viewed these students. One tutor complained, "I can deal with the kids with the discipline problems more than I can with a child when it seems to be going in one ear and coming out the other. I feel like I'm not experienced enough to help that special-ed student." A principal noted that several teachers in his school voiced discomfort with having students with disabilities being incorporated into the program.

> They just didn't know how or they were leery about the whole notion that if a child has been identified special ed and he has an IEP [Individual Educational Program] written, then aren't we taking that child away from his special program by putting him in a 90-minute program that he may not be able to handle for 90 minutes?

Special education teachers shared at least aspects of this concern. One special education teacher set out the objectives of the Roots and Wings reading programs and then cross-walked them with the IEPs of her students. She became much more reassured when she found an 80 percent overlap in the goals of SFA and the IEPs.

In the two schools that had maintained separate programs, special education teachers were much more likely to raise legal issues as obstacles to becoming part of SFA. The facilitator in one school noted that the administration and teachers were particularly reluctant because the school had been the subject of a court case in which a parent had protested the assignment of the child to a general education classroom. Special education teachers in the other school sought reassurances from the district special education office that it was legal for their students to participate in SFA.

In fact, only a few parents questioned the program. One special education teacher reported that the parents of some of her students raised concerns about the appropriateness of using SFA at first. Also, they wanted their children taught by a special education teacher. The teacher had to reassure them that all the teachers in SFA had received training in the program and that their child actually would receive more attention in a group where everyone was on the same reading level.

Finally, there were suggestions that some concerns of the special education teachers were connected to the challenge of making a change. One teacher, for example, worried about handling the larger number of students in the reading group compared to her own class, and another argued that her students, feeling safe and comfortable in her class, really did not want to change to a potentially less welcoming environment for reading.

Despite all these concerns, students with disabilities in three schools generally were included in a schoolwide SFA program, although they were often assigned to a reading teacher who was a special education teacher. When one special education teacher was asked about the reaction of general education teachers to the inclusion of a student with disabilities, she replied, "If the teacher doesn't know that the child is special education, then it doesn't phase them."

Training, Support, and Professional Development

When schools embark on a comprehensive restructuring, they are looking at a long-term effort of three or more years just to make all the changes. As a result, when schools select a reform model they enter a long-term relationship with the developer's organization to provide a variety of training and support services throughout the change process. While the developer focuses on how to change the school as a whole, special education staff are looking for more specific assistance on how to integrate their students into those changes.

Administrators and teachers noted that changing to SFA was, as one principal put it, "a lot of hard work" and involved a lot of components, but SFA "didn't come with the expectation that you would just suddenly, instantly do all this." Moreover, the same principal applauded assistance that included a lot of follow-up that reached down to the classroom level: "I think the teachers felt they were not the kind of trainers that give you one training and you never see them again, but they felt a connection with them."

The SFA Foundation offers technical assistance in a number of ways:

- ***Training.*** SFA provides both general and job-specific training to all the professional staff of the school. A three-day workshop usually starts the implementation, with follow-up workshops during the next two years and refresher workshops after that. Teachers get training specific to the level of their reading group assignment.

- ***SFA Foundation facilitator.*** In addition to the building-level SFA facilitator hired by the district, SFA also employs its own facilitators to assist schools. The SFA Foundation facilitator visits the schools, responds to queries, and provides continued training and assistance to the school facilitator. The Foundation also has an 800 telephone number so that schools can make inquiries at any time.

- ***Implementation checks.*** SFA sends teams to each school

periodically to observe the reading groups and other aspects of the implementation and to provide feedback to the facilitator and staff. Such visits initially take place several times during the year but occur with less frequency after a school has been in the program several years.

- ***National conference.*** Facilitators and principals of all the schools meet once a year for a conference that updates members, offers a wide variety of professional development seminars related to the program, and encourages networking among the sites.

- ***Manuals and related materials.*** SFA provides highly specified manuals for teachers, tutors, and family support team members that detail lessons and procedures.

In the four schools in this study, reaction to the support provided by the foundation was very positive. Teachers stressed the importance of the follow-up to the workshops in the form of site visits and implementation checks. As one teacher commented, "The visits have been helpful because we have been able to ask questions about elements of the program that we may still feel a little uncomfortable with or we don't feel are moving as smoothly as we would like."

Facilitators appreciated being assigned a point person and having access to consultants as issues arose. For some schools, this represented a new kind of responsiveness. As one facilitator explained:

> One thing, when you talk to people about Success for All, teachers know if they need something, they've got it. Usually by the end of the day. If they ask me for something, they have it by the end of the day. Whenever in a school system have you ever gotten anything the day you asked for it? Ever? And [the teachers] know that. [SFA] gives them the support they need, it gives them the materials they need. [The district] is always, always telling teachers to do certain things and never gives them anything to do it with. This is one time we're saying do it and here, do it with this.

SFA Assistance and Students with Disabilities

For all the communication and responsiveness to specific inquiries, it is surprising that in these schools SFA appears to have offered little technical assistance on how to help students with disabilities succeed in the program. In the fieldwork for this study, when interviewers asked teachers what strategies SFA had provided to promote inclusion or instruction, the question was met with little or no response. Specific strategies linked to students with disabilities generally were not provided, and teachers for the most part did not ask for them. Two of the facilitators did approach the organization to ask for help with students that were not progressing. One was given some strategies as "simple" as adding review days. According to the other facilitator, "They told us that, just keep on; keep on doing what you're doing" and that even though the students appeared stuck, over time they would get it.

The perception of non-response seems to reflect SFA's belief that, given time and repetition, their program is beneficial for the lowest-performing students, but also that SFA wants teachers to get used to implementing the highly specified program as written before they encourage any changes or modifications. For example, one facilitator indicated that it was only in the third year that SFA was saying it was alright for teachers to make some changes in the format. But even then, the facilitator indicated, she was careful not to publicize the added flexibility for fear that teachers would take it as permission to stray too far from the established curriculum and instruction.

Finally, as the teachers became more comfortable with the program, they became more proactive in seeking approval for making changes to accommodate students with disabilities. Many special education and general education teachers gave examples of how they had gone ahead on their own to use accommodations. Sometimes accommodations were applied to individual students, but if students with disabilities comprised the majority of the group, teachers often added accommodations for the

group as a whole. This was especially true for the special education teachers in the one school that ran a separate, modified version of SFA for students with disabilities.

> We pretty much go into each others' rooms and see how everybody has their things set up. As far as if you are having difficulties writing a meaningful sentence, we share ideas on that. We've shared ideas on grouping and how to get groups together. We've shared ideas on team scoring. Yes, we just share any kind of issue you have.

It was not until the one school adopted an inclusion model the third year of the implementation that the teacher hired to oversee the effort sat down with the SFA Foundation facilitator and reviewed a whole list of possible strategies and accommodations to determine which ones were acceptable and which ones were considered beyond the bounds of their model.

Lessons Learned

Whole school reform offers a powerful opportunity for schools to serve all students using a common vision and organizing focus, rather than housing a number of separate programs serving diverse goals. Including students with disabilities should be addressed from the very beginning of the selection process. Specific observations include:

- The foundation for exploring school restructuring alternatives should be finding a model that serves all the students in the school.

- Because successful restructuring requires so much extra time and effort, it is important that when the leaders and staff choose a design vision and approach, there is buy-in and commitment to following through on the implementation.

- During the selection process, staff should gather information from the model developers about how to include students with disabilities in their specific design. Schools might ask developers to provide contacts or schedule visits in schools already using the reform model for inclusion.

- During the selection process, the entire school staff needs to have frank discussions about its own concerns in adopting a model that promotes the inclusion of students with disabilities, as well as how those concerns can be addressed. Legal concerns related to including students with disabilities in the model should be clarified in an explicit manner that is understood by the entire staff.

- When a reform model is adopted, the school needs to explain the goals and changes to the parents and enlist their support. Schools could strengthen that support by bringing parents into the selection process.

- Once the school begins implementing the design, staff should request that the developer provide training and support for specific strategies related to students with disabilities.

Chapter 3

Making Changes to the School Structure

Schools cannot sustain change unless the underlying structure and organization support it. For example, if students are assigned according to their reading level, the resultant reading groups will mix students from different classes and grades, an objective that requires scheduling the same reading block time for the entire school. Putting in SFA requires changes not only to the school schedule, but to student assignments, staff positions, and teacher and school support teams. As the principal of one school noted, "from an administrative point of view, of course, it impacts on everything that you do. But I was willing to make those changes in order to ensure the program got a good start in the school."

For the special education teachers and students with disabilities, reorganizing the school provided an opportunity for changing how they interacted with the general education program. How the structural changes were made influenced the extent to which students with disabilities were incorporated into the implementation of the model.

School Schedule

The core element of SFA is a 90-minute reading block, a longer period of time than the typical reading period. Research has shown not only the benefit of extending the time but also the greater individual attention and time on task that results when the groups are small and all the students are at the same reading level. The SFA organization assists schools by providing sample schedules using several ways to create the reading block.

For the principals in this study, the challenge was not so much creating the block itself, as dealing with the repercussions for the rest of the day's schedule. Principals found themselves juggling the logistics of fitting in both the additional components of SFA and the rest of the school's agenda. For example, one principal found that the "hardest piece"of SFA to implement was the daily tutoring for the lowest-performing students. Over the course of a school day, this required pulling 25 or more students out of the classroom for 20 minutes each to work one-on-one with a tutor. Administrators already had to figure out a way to schedule these sessions without interfering with lunch and time set aside to work on math. The implementation of the 90-minute reading block meant another substantial part of the daily schedule could not be used for tutoring. Cordoning off such a large block of time across the

school also made it more difficult for principals to schedule meeting time for teacher teams.

Some special education teachers also saw the 90-minute block as taking away too much time from the rest of the day. Teachers with this viewpoint saw the reading block as a trade-off for time that could be spent working with students in resource centers on the skills identified in their IEPs. For example, when one special education teacher was asked if SFA should continue in the school, she replied:

> In some instances I would say yes, and in some instances I would say no, just because of the time factor involved in it. I think that would be my major hindrance, because it does take a big chunk, amount of time, from the special-ed students. That's just my perspective from the special-ed students, is that's a big chunk of time. But in other instances I could say yes, because there have been such gains in it.

Teachers who expressed this attitude tended to view SFA as an add-on rather than an opportunity to address the skills identified in each student's IEP. As one school moved to the full inclusion of students with disabilities, the special education teachers viewed SFA as another part of the school day during which students worked on specific goals identified in their IEPs.

Student Assignment

A key precept of SFA is student assignment by reading level in small groups. Such a homogeneous assignment addresses the child where he or she actually is in reading rather than by grade or class, and because everyone is on the same level, there is more time on task. The facilitator at one school explained the situation before the school implemented SFA this way:

> Let's suppose Tyrone is in the fourth grade, but Tyrone is only reading on a second-grade level. Every morning Tyrone sat with a fourth-grade reading book and was supposed to read the story and then answer some questions in a workbook. Well, obviously he couldn't. So he sat there and did next to nothing, so he didn't learn anything, so the next year when he's in the fifth grade he is still going to sit and stare at a book and not do anything and not learn anything; and then he'll go to the sixth grade and sit and stare. But meanwhile, he's still reading at the second-grade level. So those children were there. They just weren't really doing anything or learning. But that was expected, you see. It was expected that they wouldn't learn anything, so it wasn't really a problem.

For these schools, SFA seemed a good fit because the model required the facilitator to make frequent assessments not only to place students at their appropriate reading levels but also to allow students to progress at their own pace. While this strategy made sense for general education, principals and teachers also saw it as a beneficial approach for including students with disabilities. As one teacher viewed it:

> Because now the special-ed children are in the reading groups with some children, they are on their same grade level, in their classrooms, as opposed to being isolated as before. I think they like that interaction that they get with other children and being allowed to go from one place to the other without saying, "No, sit down, stay here."

The special education teacher at another school saw the "social aspects" as the biggest advantage because "many of our students don't do well unless they have that added push. And socially, they are pressured to work with others, to learn to work with other teachers." This teacher found that both the social and academic performance improved when students felt better about themselves and gained confidence.

For some, using homogeneous student assignments raises the fear that the placements really are not so homogeneous if students with disabilities are conspicuously older than the others in the class. This

was less of an issue in these schools because so many general education students were also older compared to their reading level placements. One facilitator told how "we have some that are in sixth grade that are reading on the first-grade level, while first graders/kindergartners are reading on the first-grade level, too." The facilitator ended up forming two reading groups, one for the sixth graders and one for the "little people" so that the two would not have to be mixed.

As general education students in these schools catch up to the grade level associated with their age, gaps between grade and age level for students with disabilities may become more important. The special education teacher in one school worked with the SFA facilitator on the assignment of students with disabilities to reading groups. The inclusion teacher admitted that she tried to keep students with disabilities with or close to their age group. She worried students with disabilities suffered if there was too great an age difference with the other members of the group reading at these students' level.

While SFA promotes homogeneous assignments, the implementation at these schools did not always mirror this SFA guideline, especially in the assignment of students with IEPs. For the schools in this study, too many students were assigned to grade-level reading classes even though they were reading well below that grade level. During the first two years of this study, the four schools demonstrated four patterns for assigning students with disabilities to reading groups:

- ***Students with disabilities assigned to a separate program.*** General education students and students receiving special education services were kept in completely separate SFA programs in one school. Special education teachers received SFA training and materials, but their students did not have access to support services, such as the tutoring. The special education teachers, rather than the SFA facilitator, decided student assignments to reading groups. Only special education teachers taught the reading groups. Because both the general and special education programs were using the same program, SFA provided some sense of commonality across the two populations, but for all practical purposes this approach maintained the sense of separateness for students with disabilities.

- ***Students with disabilities included in the general education program with resulting de facto segregation of assignments.*** At some point in the study, three of the schools used this approach. All the students participated in the same program with the SFA facilitator making student assignments. Students with disabilities assessed at higher levels were individually assigned to classes with general education students and general education teachers. However, the facilitator ended up assigning most of the students with disabilities to the lowest reading groups, which were run by the special education teachers. These classes often included a few general education students assessed at that level, but students with IEPs predominated in these classes. In some instances students with disabilities had access to tutoring, and in others the special education teachers were expected to provide those services during the time students spent in the resource centers working on their IEPs.

- ***Students with disabilities assigned by grade level and track.*** In one school the facilitator did not assign any students across grade levels. For example, third-grade students in both general and special education programs were assigned to third grade level reading groups. The facilitator then used the assessments to track student assignments into a high, middle, and low grouping for each grade. This was done because the district holds the school accountable by testing for reading on grade level. Again, students with IEPs tended to be assigned to the low group that was taught by a special education teacher. As a result, other students labeled the low group as "special education" with negative connotations attached to that

identification. In addition, contrary to the goal of SFA, teachers found themselves working with very heterogeneous groups of students ranging over several reading levels.

- ***Inclusive assignment of students with disabilities.*** Finally, one school adopted a full-inclusion model for both the SFA reading block and the rest of the school day. In this example, the facilitator consulted with the special education teacher in assigning students to reading groups. The special education teacher made sure that no more than three or four students with IEPs were assigned to any one reading class. All the classes were taught by general education and special subject teachers. During the reading block, two special education teachers and two aides circulated among the groups, providing support for students with disabilities as needed.

The experiences of these schools highlight the need to pay attention to the details of restructuring the school. In the four schools studied, the principals and facilitators consistently reported that the SFA reading block was being implemented and that students were being assigned to homogeneous groups by reading level. Yet the assignments for students with disabilities varied considerably and "homogeneous" groupings proved a fairly elastic concept when put into practice.

Teacher Assignments, Positions, and Teams

The implementation of SFA required changing existing teacher assignments, creating new staff positions, and providing opportunities for the relevant teachers to meet together as a team. These changes posed challenges to both the general and special education staff.

The reconfiguration of all the teachers to staff the reading block resulted in new assignments for many teachers. For example, to create smaller reading groups, SFA assigns special subject teachers, like the physical education, music, and art teachers, as reading teachers. Many special subject teachers approached this new assignment with apprehension, arguing they lacked training and experience in this area. While they had experience in teaching reading skills, some special education teachers also had reservations about teaching SFA reading groups because it represented a group rather than an individualized approach. For example, even though the reading groups were smaller than the general education classes, a special education teacher complained that a class of 12 or more still was too large.

Although all the teachers received formal training from SFA, facilitators reported that they ended up relying on the SFA teacher's manual to help teachers new to such reading groups. The manuals provided very specific directions for the content and classroom management of each lesson, literally a scripted approach to compensate for the varying experience and inexperience of the teachers using the model. As the physical education teacher at one school reported, "I knew nothing about phonics or any of this, and I was forced to just follow the manual."

In addition to changing teacher assignments, SFA requires that schools create staff positions new to most schools. Key to the SFA model is a facilitator position to run the day-to-day operations, such as distributing materials for each reading unit and testing and assessing student placements, as well as providing instructional leadership by observing classrooms, suggesting improvements, and answering questions about the program. One of the challenges of the position was summed up by one facilitator as her first time "working with adults" after spending a career as a teacher working with children.

By reviewing reading group assignments every eight weeks, the facilitator has a lot of influence on how students with disabilities fare in the program. Yet the facilitator often makes the assignment knowing little more about the students than their reading level. Some consult with the special education teacher in their reading teacher role but some report that they do not even know if the child has an IEP. Only in the full-inclusion school did the facilitator get more formalized help in placing students with disabilities. In this school the

existence of a teacher position to oversee the inclusion of students with disabilities and to advocate for them resulted in the facilitator receiving informed and consistent advice. In this instance the inclusion teacher who helped the facilitator make the placements knew each child, their IEPs, and their learning styles. The inclusion teacher also guided assignments so students with disabilities were integrated across the classes rather than being concentrated into a few designated reading groups.

In addition to the facilitator position, SFA also requires dedicated tutor positions to provide one-on-one assistance to students falling behind at the early reading levels. While most schools assigned the reading teacher to this position, schools required the equivalent of at least three full-time positions to fulfill the tutoring needs of the design. Principals turned to their educational aides to fill the needed positions and made the assignment in a variety of ways. At one end of the spectrum, the principal made tutoring SFA the sole job of two aides. At the other extreme, the principal added the tutoring of three or more students to duties already performed by all ten aides on the school staff. So in addition to classroom or other assignments, such as parent liaison, each aide also did tutoring during a 60- to 90-minute period of the day.

In these schools there was a drawback to assigning aides as tutors. In addition to their assigned duties, the aides substituted for absent teachers. At least one aide reported that about half her time was spent covering classes for absent teachers. This meant that not only were tutoring sessions frequently cancelled but these tutors also ended up filling in for teachers during the SFA reading block. Because the aides were not considered classified staff, they generally received little of the formal SFA training, except as tutors. Yet they ended up substituting in reading groups at all levels. One aide, after recounting how during that week alone she had filled in for groups at four different reading levels, noted that sometimes the aides would call themselves "super-people." The aide went on to explain how she figured out what to do when she was a substitute:

> What I do is I talk with [the facilitator] a lot, and I ask questions, and upstairs in her room, her supply room, she does have extra books. So what I did was, I have a Roots book and I have a teacher's manual and I have [a] Wings teacher's manual. When I go in the room, I have the teachers tell what days they are working on. Some of them have their work set out for you, and some of them don't. But the children, the majority of the time, will help you.

Finally, restructuring teachers' assignments and positions can have repercussions for the existing supporting structures in the school. One element of SFA is to have teacher grade teams meet on a regular basis with the SFA facilitator to share experiences, problem-solve, and discuss with the facilitator areas of uncertainty or needed help. As one teacher described the need for teacher teams:

> You know, this program was new to everybody, so everybody was, that first couple of months, stumbling and bumbling: "What are you doing? What works best for you? What happens when this child doesn't want to work in this group?" You have to look to each other to get feedback and to bounce different ideas off and find something that works for you as far as getting your cooperative learning standards and team work, etc.

Schools tended to assign this element of SFA to their existing teacher grade team structure. As a result, special education and special subject teachers were not necessarily assigned to relevant teacher teams in terms of SFA. Only one school created a new team structure that allowed all the teachers doing the Roots (the beginning reading curriculum) and all the teachers doing Wings (the upper grades curriculum) to meet together once a month with the facilitator. Even these meetings were subject to frequent disruption since they were dependent on special subject teachers taking over the classes and there was a high absentee rate among the staff.

Other Support Structures

Finally, the SFA model includes components that are similar to structures that may already exist in the school. In particular, this was the case with the family support team and the programs involving parents in SFA. Schools tended to look for ways to combine the new with existing structures. This practice sometimes led to confusion over the purpose of some of the supporting SFA elements. In some instances, schools continued to use their own related programs rather than adopt the SFA version.

In the SFA model, the family support team creates action plans to address the needs of individual students. The team is made up of the SFA facilitator, principal, school counselor, parent liaison coordinator, and other health and social services personnel assigned to the school. The referring teacher and child's parents participate in the formulation of the action plan. Like all of the elements of SFA, the objective is to help students by removing barriers that hinder the student's learning. Examples of the kinds of problems addressed by family support teams in this study included chronic tardiness or absenteeism, personal hygiene problems, and inappropriate classroom behavior.

Many teachers did not always understand the role of the family support team. For example, in one school, a teacher described the purpose of the family support team as providing intervention to prevent referral to special education, while a colleague from the same school said that the purpose was the opposite, "to funnel people *into* special education," rather than address the needs of students at risk of failure.

Much of the confusion reflected how the SFA family support team was housed in the organization of the school. Because there was overlapping membership, the family support team was scheduled to meet at the same time as the building-level team that dealt with special education referrals. The agenda of one was followed by the agenda for the other. In many teachers' minds, the teams became enmeshed.

The situation became even more complicated during the second year of fieldwork, when the district mandated that each school establish a teacher assistance team (TAT) as part of the pre-referral process for special education. In setting up this team, schools found that not only was there overlapping membership with the family support team but to a great degree the two teams shared overlapping purposes, in that the TAT also identifies interventions that might prevent the need for a special education referral. Basically, the schools ended up combining the teams. As the counselor in one school pointed out, they now refer to it as the "family support team/TAT."

While combining the family support team with the TAT made sense, some problems persisted. Counselors found the separate paperwork required by the two teams cumbersome, especially since they both collected the same basic information. The TAT paperwork was perceived of greater value because, if the case went on to referral for special education, much of the paperwork was already done. Moreover, confusion persisted in that many teachers still did not perceive the broader role of the family support team in addressing students' problems, particularly after the family support team was even more closely linked to the special education pre-referral process.

SFA also tended to bump up against established programs for parents. SFA tries to familiarize parents with the reading instruction and let them know how to support reading through a series of workshops known as "Raising Readers" and opportunities to visit their children's class for "Books and Breakfast" or "Chapters and Chips." However, all these schools had difficulty getting parents into the school, and most already had programs run by the counselor or parent coordinator geared to a variety of topics that might interest parents. In the first year of the study, schools provided parents of beginning readers the opportunity to attend the SFA classroom programs, but attendance was minimal. By the second year of the study, the schools for the most part had abandoned the SFA parent programs. The experience of one school was typical. The counselor had spent several years developing a parent program geared more to individual and family needs than to understanding how to help children learn to read. With the low turn-out for the SFA parent programs, it was easy to stop providing that program

and continue the established program for parents that included job skills seminars, healthy cooking classes, and tax preparation sessions. As one teacher put it, "It's things that we find would be interesting to the parent, to our clientele in this particular neighborhood." The parent programs, the teacher explained, were "absolutely not" geared to reading or SFA.

The experiences of these schools highlight the challenge of integrating a restructuring model with ongoing efforts. Too often the elements of the model are treated as an additional layer on top of everything else that goes on in the school.

Lessons Learned

How a school reform model is implemented influences the degree to which the intent of that model is achieved. In this study, the schools agreed not only to implement SFA but to widen the population served by including most of the students with disabilities in the SFA program. Yet how these schools actually restructured to accommodate the model and the expanded target population did not always support the goals of SFA or inclusion. The resulting organizational changes in the daily schedule, student assignments, staff positions, and support teams often represented a partial implementation or compromise with pre-existing approaches. Specific findings indicate that:

- Promoting collaboration between general and special education teachers does not come naturally, even with the implementation of a whole school reform model. Successful implementation may depend on the creation or realignment of organizational structures, such as teacher teams, to support the interaction of special and general education teachers around teaching and learning issues.

- Combating long-standing practices of tracking and isolation of students with disabilities may be a tough job for even the most rigorous whole school reform models. It is too easy to fall into a pattern of de facto segregation, even when students with disabilities are "included" in the reform model. Assigning special education teachers as additional classroom support rather than as classroom teachers provides more incentive to disperse students with disabilities across a number of classrooms.

- Cordoning off new staffing positions can help prevent dilution of the reform. New duties like tutoring cannot simply be added to existing jobs without taking something away. For example, in schools strapped for resources, the assignment of para-professionals as tutors may be seriously compromised by other demands that overextend and pull them away from their roles in whole school reform.

- Abandoning existing programs and structures is part of the change process. Schools have to make difficult choices when staff have vested time and effort over a number of years in programs unrelated or detrimental to the reform model. Existing structures do not automatically become competition to the new model. Schools can adopt and adapt existing structures to the purpose of the design as long as everyone understands the role played in the new reform.

Chapter 4

Determining What Goes On in the Classroom

The heart of whole school reform is the change that occurs in each classroom. Reform models employ varying degrees of specification concerning curriculum and instruction, but all provide guidelines. Some, for example, require project-based, experiential approaches that relate learning across disciplines. Many require teachers to develop at least some aspects of the curriculum. In contrast, SFA is one of the most highly specified reform models, providing daily lessons and schedules for instruction through the teacher manuals and classroom materials. As a result, SFA often is described as a "scripted" approach, leaving teachers more limited room to add their own adaptations to the curriculum and instruction provided by the model. SFA characterizes its approach as one that uses specificity to compensate for the wide range of capacities in order to provide effective instruction across the teaching force. In addition, SFA argues that all the curriculum, instruction, and classroom management strategies incorporated in the units are research-based, representing the "best practices" for teaching reading skills.

This section focuses on teacher reports of what worked and what didn't in the classroom and whether special education teachers believed SFA fit the needs of their students. It then examines the resulting dilemma for both general and special education teachers. To what extent can teachers change what goes on in the classroom without changing the reform model itself?

What Worked

Interestingly, the SFA elements that respondents identified as most beneficial for students with disabilities were the same ones they identified as helpful for general education students. Across all four schools several themes emerged as to what worked about the program. First and foremost, respondents approved the re-emphasis on phonics. Prior to the adoption of SFA, the district had mandated that schools use the whole language approach to reading, and the district had interpreted whole language as excluding the use of phonics. Teachers felt that the emphasis on word attack and decoding skills contained in SFA greatly helped the students acquire the basic skills of reading. In addition to this major shift in the curriculum, teachers identified other aspects as beneficial:

- ***Homogeneous student assignments.*** Many respondents noted that a more accurate placement of a child that truly reflects his or her reading skills was a helpful

aspect of the program, even though the schools did not follow this practice all the time, especially for students with disabilities. Still, most respondents endorsed the concept. As already noted, because so many children were reading well below grade level, this aspect of the SFA model seemed suited to helping students make up what they had missed. For students with disabilities, the homogeneous assignments eased their acclimation into the group. And as one special education teacher pointed out, placement at reading level meant that the materials were appropriate also.

- ***Structured program.*** Teachers believed that both general education and special education students benefitted from the highly structured nature of the program. They talked about this aspect of the program in two ways. First, SFA organizes the 90-minute period, in the words of one teacher, "so everybody knows what's happening, and everybody knows what should be taking place during that time." Daily schedules of events are posted in each class, and the same general pattern of activities is followed for the four- or five-day cycles of each reading unit. The pattern is so consistent that teachers and aides who served as substitutes reported that the students themselves reminded whoever was running the class what came next.

  Both general and special education teachers praised this aspect of the program. In the view of one general education teacher: "It is a very strict program, which is good because it is structured. The children always have to have a routine. You know, things that are structured, it makes it a little easier, especially with some of them coming from unstructured home lives."

  A special education teacher in the same school had a similar view. "I like Roots [the SFA beginning reading program]. It's consistent. That's what you usually find with children who have disabilities. They need some kind of program that is consistent. They know the program, they know what to expect, they know what's coming next."

  Second, some respondents noted the internal structure to the instruction provided. As one teacher commented, "I like how everything is related and everything is piggy-backed off of each other." A facilitator described it as follows:

  > One of things I see that's really helped and helped those kids transition out is the routine is so set. The children know what's expected of them. It's not a surprise package every day. They know what they're going to do. They know what's expected of them. They get into the routine. They say, "Okay, if it works for this word, it should work with that word, and if it works with this story, it should work for that story, and if I look for this here, I should look for that there." And so I'm seeing them having enough repetition in order for it to hit, for it to stick, for them to see, "A-ha, I can do it." And they have proved that they can do it.

  The repetition built into the structure was identified by many as a strength of the program, especially for students with disabilities.

- ***Cooperative learning.*** The use of partner and team strategies was also cited as a strength of the program. However, many teachers looked at cooperative learning as more a class management technique than an instructional strategy. As one teacher related, "I think it has helped a bit with interpersonal relationships because I have people now who will partner-read who didn't want to sit next to someone." Another teacher found it a positive approach for the students:

  > ...because one of our problems is that ours

> [the students] don't get along too well together, if I may say so. But when they are in the reading group, they must feed off each other. This is a team thing—not "I" but "we." So you must work together today and every day you come into my room. So that's good, that they must feed off of each other in a positive way, instead of trying to box each other.

What Didn't Work

Just as general and special education teachers had similar lists concerning positive aspects of the program, they tended to agree on what they did not like about SFA. In fact, many of the same elements of the program that these teachers praised also bothered them.

- ***Instruction pace.*** Teachers found the way the program kept moving from one activity to another helped keep students engaged. Yet the most frequent complaints were about the fast pace of the program. The SFA guidance includes how many minutes the teacher should spend on each activity during the 90 minutes, with some activities three or less minutes long. Both general and special education teachers became frustrated when they had to move on even if they believed not all the students had grasped that part of the lesson. Teachers also cited missed opportunities to relate what was going on in reading to what children were learning in other subjects. As one principal explained:

> Classroom teachers are in the habit of being able to use time at their own discretion. If they see that a student needs extra time, they can extend, extend, extend, but with SFA, you cannot do that. You have to follow the program as written.

- ***Repetitiveness.*** The repetition built into the structure also got mixed reviews. Some teachers worried that after three years in the program, students in the upper grades were getting bored due to the repetitiveness of the lessons.

- ***Learning styles.*** Special education teachers were particularly concerned whether the instruction addressed the different learning styles of learning-disabled students. For example, one special education teacher found "some children are picking up sight vocabulary by the repetitiveness; others, sometimes it can be a little handicap because they will see those same words out of context and they wouldn't know them." Another special education teacher noted:

> Special-ed children are as different as shoes are. You know, there are no two special-ed kids who are alike. We have auditory learners, and the visual learners, I find, will pick up the vocabulary better; where if you have an auditory learner, then you are going to have to work a little harder so that they will pick up the visual part of it. I put a little energy into that, but that has been effective.

- ***Specificity.*** For the teachers themselves, the major complaint was feeling too constricted by the guidance provided by SFA. They complained the reading units were *too scripted* and as a result, too "uncreative." In addition, after three years the teachers themselves got bored with the repetition built into the program.

Although teachers complained about these aspects of the program, most were reluctant to make changes to the lessons on their own authority. Most reported that they followed the SFA guidance even when they thought there were better instructional approaches. However, some did go ahead and make changes. These varied from minor adjustments in the instructional activities to significant changes in the content and approach.

The Dilemma of Making Changes

In this study, the teachers making the most substantive changes to the program tended to be new teachers or teachers unwilling to give up activities they had created. For example, a visit to one class being taught by a special education teacher revealed a highly engaged class playing a group game totally unrelated to the lesson. The teacher later explained that she had to be creative, and the students were interested due to the activities she added. In another example, a new, and yet uncertified, teacher also found reasons not to adhere to the SFA script:

> It was my first year of teaching, so I've never had a formal reading program to compare Success for All to. So I am going along with the program, and if there was something that I just didn't like, I'm not doing that. But this year, I see the importance of a lot of the things that they had in the book, and I'm like, "Oh, that's why."

Most changes made by teachers were less extreme, but interviews revealed that special education teachers were more likely to make adjustments than general education teachers and that these tended to be the standard modifications used in special education. Most reported using one or more of the following adjustments:

- Rewording instructions and questions to increase understanding;
- Breaking down assignments, worksheets, and questions into smaller, discrete units;
- Reducing the size of an assignment due within a set amount of time;
- Employing multiple forms of expression, such as art work, when the program allowed; and
- Adding review days for students who needed more time for a particular lesson.

Special education teachers often complained that while such accommodations helped, what they really needed was more time to make sure their students understood each assignment before moving on. Yet the special education teacher at one school reported that when she asked the SFA Foundation facilitator about adjusting the time allotted to each activity, she was told that the pacing was one aspect of the model that had to be maintained. The pacing allowed the reading class to cover all the elements of the lesson. SFA relied on the repetition that occurs across several days for each unit to help all the students reach a level of competence in the unit. Facilitators reported that only after the schools had been doing the program for two years did SFA let them stretch lessons by adding review days.

The experience of these schools highlights the difficulty of maintaining fidelity to the model or quality control. SFA is one of the most specified comprehensive restructuring designs, and part of the developer's continuing technical assistance is a periodic implementation check. Yet these visits take place over one or two days and include only a few minutes of observation in each classroom. In addition, each school has its own SFA facilitator who observes classes, works with teacher teams, and provides feedback. However, the in-house facilitators reported that their ability to influence what goes on in the classroom often depended on persuasiveness and their standing among the teachers rather than any authority to direct teachers' instructional practices. In-house facilitators sometimes found teachers jealous of their position, a kind of halfway house between the jobs of a teacher and an administrator. So while teachers reported taking problems to the facilitator, the facilitators in this study reacted more as coaches and sources of information than as arbiters of which teaching practices were acceptable.

Ultimately, both general and special education teachers determine what goes on in their classroom. Model developers can build in support and feedback, but the teachers themselves determine the extent to which they maintain the character of the design.

Lessons Learned

Teachers have to be willing to give the reform model a chance. The nature of the reform may be compromised if its application in

the classroom is not aligned with the guidelines for curriculum and instruction advocated by the model. While this does not exclude teachers making adaptations tailored to the needs of their students, teachers and other staff should be cognizant of keeping within the intent and character of the reform model. Special education teachers might find such strictures particularly challenging coming from an environment with more freedom to individualize instruction and employ accommodations.

As teachers implement a comprehensive restructuring model in the classroom, they must find ways to practice and be comfortable with the specifications of that model design. In particular,

- Teachers and other staff need to understand the model in terms of the challenges presented in the classroom. Although teachers learn something of the model when the school chooses the design and during training workshops, it is only when teachers begin practicing the new model in the classroom that they begin to understand the extent of the change.

- Teachers should use the facilitators, the developer's organization, and other resources provided to learn the classroom practices and help address problems that arise during the implementation. Teachers need to be proactive in seeking advice and help without fear of penalty. The extent to which the teachers themselves form a learning community around teaching within the design can provide a powerful support.

- Special education teachers, like the students they serve, need to approach the model willing to try everything. For many, the model may advocate changes in the way they have taught or their expectations about what students with disabilities can achieve. Rather than immediately incorporating accommodations or lowering expectations based on disabilities, special education teachers need to learn and to try the model, and then base any subsequent changes on the evidence of student outcomes.

- Both special and general education teachers can make adjustments and enhancements within the character of the reform model.

Chapter 5

Creating an Integrated Reform

Successful whole school reform occurs only when it becomes integral to the vision, organization, and culture of that school. Elements of a restructuring model may be implemented, but if the school staff views these as add-ons or the latest district fad, the reform is less likely to be incorporated over the long term.

The schools in this study found themselves under several mandates. As targeted-assistance schools they had to adopt a restructuring model. The district also set minimum targets for each school to improve performance on the SAT-9, used as the district's accountability measure. Finally, as the district was under federal pressure to meet the guidelines of the Individuals with Disabilities Education Act (IDEA), more students with disabilities were spending at least part of the school day with the general education population.

While all these mandates might have been integrated into the effort at whole school reform, the schools tended to deal with the three as separate issues. As a result, these schools at least initially missed an opportunity to institute more fundamental changes to their vision and culture that would have dealt with these challenges in a holistic fashion.

Responding to the Mandate for Test Improvement

The district began using a high-stakes approach to testing in 1998. The district administered the SAT-9 across all grades every spring. The results in reading and math became part of a public report card, and the district set annual, required increases in performance for schools. Poor-performing schools were under threat of closure or reconstitution, so for the schools in the study, the stakes were very high.

The adoption of SFA would appear to have been an effective way for the schools to improve reading performance on the SAT-9, but school staff worried about a mismatch between the two. SFA provided the schools with documentation that showed the skills taught in SFA aligned with those tested on the SAT-9. While in the words of one teacher, this "cut down on their concern," all the schools undertook a number of separate activities to prepare students for the test.

Providing students with additional test preparation reflected the school staff's continued perception of a disconnect between the two mandates. As both SFA facilitators and teachers pointed out, while SFA

promoted assigning students to their actual reading level, the district tested students for reading on their grade level. With such a large proportion of the students reading below grade level, this often meant that SFA reading-level placement and SAT-9 grade-level testing were mismatched. Moreover, students could make substantial progress in reading and still be classified as exhibiting "below basic" skills on the SAT-9.

To compensate for the difference, the schools instituted a number of additional test preparation activities, often at the expense of SFA. For example, over the two years of fieldwork in this study, all the schools stepped out of the SFA model at some point to use the time and resources to promote student readiness for the SAT-9. The following were some of the ways schools added activities for test preparation:

- One school provided SFA tutoring only from September through February. This allowed the teachers' aides doing the tutoring to return to their classrooms and work with students on their vocabulary and test-taking skills in preparation for the SAT-9, administered later in the spring.
- Three schools stopped doing SFA units in the reading block in the weeks prior to the SAT-9 test so teachers could use the time to prepare students for the test.
- One school ran a totally separate reading block in the afternoon in addition to the 90-minute SFA reading block in the morning. The afternoon curriculum was linked to preparation for the SAT-9.
- One facilitator assigned students to SFA reading groups by grade rather than reassigning them across grades to their tested level.
- One facilitator reported that a significant amount of her time had been reassigned to working with selected students on preparation for the SAT-9.

The fact that these schools supported a number of ways to prepare for the test outside the reform model meant that staff were never sure how to measure the effectiveness of SFA in terms of success or failure in meeting the SAT-9 performance goals. While many teachers gave the implementation of SFA at least some of the credit, others wondered if all that was involved in improved scores was the longer reading block or the additional activities and curriculum the school had added in response to the test. The hedging strategy used by the schools undermined staff considering the reform as fundamental to the school.

It should be noted that the district testing was not as significant an issue with the special education teachers at the time of the fieldwork because half or more of the students with disabilities were exempted from the test. This probably will change in the coming year, when all the students with disabilities taking SFA will also be required to take the SAT-9.

Including Students with Disabilities in the Reform

For most of the schools in this study, there continued to be significant problems integrating students with disabilities into the schoolwide reform. One of the major barriers in the minds of the special education teachers was the need to address each student's IEP. Instead of viewing the SFA reading block as an opportunity to work on some of the skills identified in the IEP, many special education teachers treated the IEPs as separate entities to be worked on when students with disabilities were in the resource center. Only a few special education teachers cross-walked the goals of the IEP with SFA. However, for many teachers, the 90-minute reading block of SFA became competition for time that could be spent in resource centers working on students' IEPs.

The traditional mainstreaming approach used by most of the schools in the study underscored the mindset that students with disabilities met their academic goals through a separate education program. Not only did students continue to spend a significant portion of the day in resource centers, but even when taking SFA, most of the students with disabilities were assigned to the same classes under special education teachers.

Only in the school that moved to a full-inclusion approach did teachers more specifically view the SFA reading period as an opportunity to work on skills identified in students' IEPs. This reflected a shift from the "halfway house" of continued dependence on resource centers to fully integrating students with disabilities into general education and providing in-class support or more limited, pull-out tutoring by special education teachers and aides.

The differing roles of special education teachers in the traditional mainstream and full-inclusion approaches proved key to integrating students with disabilities more fully into SFA. As long as special education teachers were assigned to run classes in the SFA reading block, the facilitator had an incentive to assign students with disabilities to classes run by special education teachers. Once special education teachers served in a support role across the classes, there was an incentive to spread out the assignment of students with disabilities so that no single general education teacher had too many in one class.

Lessons Learned

Even though implementing a reform model can involve changes in the organization and classroom practices of a school, the reform itself may be shallow if it does not become an integral part of the school and its entire agenda. Rather than seeking separate solutions, schools should use the common vision and principles provided by the reform model to integrate and develop complementary responses to the different mandates placed on the schools.

Among the lessons learned are:

- Districts should review all their mandates to ensure that schools do not have to deal with conflicting requirements.
- Districts, schools, and model developers need to cross-walk the goals and content of the reform with mandated standards and accountability measures.
- Special education and general education teachers need to identify how they can use the reform model to address the goals of students' IEPs.
- The more the school adopts a full-inclusion approach, the more likely that students with disabilities will be considered part of the reform and not visitors from another program.

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